

Memorandum

To : Mr. Ramon J. Hirsig
Executive Director

Date: November 7, 2005



From : Karen Johnson, Deputy Director
Administration Department

Subject : **Succession Planning Update**
Item P1 #2 - November 15, 2005

Succession Planning is a strategic and integrated approach toward managing the Agency's human resources in response to a maturing workforce and its associated loss of program expertise and skill sets, institutional knowledge, and organizational networks. The overall strategy for Succession Planning must include other critical human resource programs, i.e., recruitment, retention, and training.

Retirement eligibility begins at 50 years of age with 5 years minimum service. The average retirement age in the state workforce is 60 years. According to BOE personnel data, 34% of BOE rank and file employees and 46% of BOE managers and supervisors are 50 years or older and eligible to choose retirement.

BOE Succession Planning Work Group

On 10/24/05 the work group met to discuss the impact of the maturing working force on the BOE and identify planning challenges and solutions. The Group is comprised of a manager/supervisor from each business area at the BOE, inclusive of the field/district office and will be meeting quarterly. Several members of the Group participate on the State Personnel Board Workforce (Succession) Planning Group. Additionally, staff is attending Succession Planning training programs offered through both the CA State University of Sacramento and Corporate Personnel Services (CPS). These courses provide resources, planning solutions, and tools to implement and measure an effective Succession Planning program.

The Group identified the following elements as key components toward addressing the Succession Planning needs of the agency:

- Developing a centralized training information system which tracks and follows an employee throughout their career.
- Enhance training programs to include workload planning, effective delegation, mentoring and developing staff, and preparation for state and promotional exams.
- Develop specific training academies that target new employees, audit/compliance staff, and managers/supervisors.
- Re-engineer outdated management tools to assist in assessing current and future workplace resources and staffing.

- Enhance the current Upward Mobility and Career Development programs to include a broader application at the BOE.
- Streamline personnel processes that deal with testing, examination, hiring, and transferring staff.
- A Project Charter outlining timelines and project deliverables being finalized and distributed to the Group for approval.

We will continue to update you on these efforts. Thank you for your continued support as we move forward toward developing a comprehensive plan addressing the vital staffing components of our Agency.

KJ:kt

KEC
11/9/05